Heritage IV: new system installation at Central School of Speech and Drama

J. Adam Edwards,

Head of Learning and Information Services, Central School of Speech and Drama

Abstract

Central School of Speech and Drama is an HEFCE funded specialist theatre college in north London. The move to a new library in the summer of 1997 gave us the space and the network to upgrade from our old CAIRS system. The article describes how we chose Inheritance Systems Heritage IV and some of the useful facilities the system offers.

Background

Central School of Speech and Drama is a specialist theatre college funded by the HEFCE having formerly been funded as part of the polytechnic sector under the PCFCE. Famous alumni include Lawrence Olivier, Errol Flynn, Dawn French, Jennifer Saunders, Jennifer Ehle, Peter Davison and Stephen Tomkinson.

The School is home to around 750 students and 90 staff. We train students at foundation, undergraduate and postgraduate level in three main areas:

- Performance, including a specialist voice MA, one of only three such courses in the world.
- Theatre practice, which at undergraduate level covers thirteen strands from set design to puppetry and is about to add a unique fast track BA circus course linked to the Millennium Dome.
- Drama education, a degree complimented by two PGCE courses and a distance learning MA.

The School has two sites in north west London, the main site at Swiss Cottage and a smaller site on St Pancras Way in Camden.

The author was appointed in August 1997 to be the first Head of Learning and Information Services (at the time Learning Resources), which brought together computer, library and media services on both sites. The main library houses some 20,000 books, a collection of specialist journals, a large collection of videos and a growing collection of multimedia CD-ROMs. The St Pancras Way site has a small collection of books and a few journals.

Why change?

In summer 1997 we moved into a new library on the main site. Instead of two cramped rooms containing 4 reader spaces (one of which had to be used by the library cataloguer!) we gained three floors of the new East Block. The service was thus transformed from one where little space forced provision to be very staff intensive to where large amounts of space (designed in the expectation of 1000 students) meant a change to a much greater degree of self service use. The building is fully cabled, to allow access to the Internet and shared resources.

With the move came the existing CAIRS system running on three 386 PCs. The system had no OPAC, so all catalogue searches had to be done at the counter on the single terminal. CAIRS stored each accession as a separate item, so ten copies of a book created ten records. Keyword searching could be a long winded process of wading through multiple records. Results could only be searched sequentially and were displayed in the order they had been catalogued. The system could not be used to provide a viable self service OPAC.

Circulation was by two part slip, the circulation module on CAIRS having not been implemented at that time. (The original plan was to implement circulation once the new library had settled down.) With the opening of the new library, usage shot up as suddenly the book stock became much more visible, indeed students were convinced that we had bought more books. This put huge strain on the paper system, with staff spending hours filing paper issue slips.

The system could not be networked to St Pancras Way or to other workstations over the network incorporated in the new building. The system was no longer being upgraded by CAIRS who were very keen to sell us their new product.

It was clear that the existing system was totally unsuitable for the new library and either an upgrade or new system was required.

Evaluation and selection

A month into my new job I went to Libtech 97 at the University of Hertfordshire. This gave me a chance to see the different products on offer. It became clear early on that the cost of an upgrade to the new CAIRS system would be not much different from the purchase of a new system from elsewhere.

Selection went through two stages:

Long list

In November 1997 we employed Robin Yeates, Senior Researcher at the Library Information Technology Centre at South Bank University, to write an operational requirement. This specified in some detail the features we wanted in our system. Some advanced yet non-essential features, Z39.50 compatibility, were included to test the development potential of the system.

We wrote to 14 potential suppliers. Eight replied, one turning us down (with the apology that they already had enough custom!) and seven with responses to our requirements. We then scored these responses against our requirements, a process very similar to scoring job applicants against staff selection criteria. This eliminated three of the systems (one of whom simply sent technical details with a letter basically telling us to work it out for ourselves!). The producers of the remaining four - I shall call two A and O to spare their blushes - A, CAIRS, Heritage and O, were invited to demonstrate the systems to us.

Short List

It is very easy to buy a librarian friendly system. We wanted to be sure that what we bought was customer friendly and we were particularly concerned that the large number of our students with dyslexia would not be disadvantaged. (Theatre is a field which attracts dyslexics as study is performance based rather than written.) Invitations were sent to heads of academic departments to involve their staff and students in the selection process. A small group attended each demonstration. The Student Union Equal Opportunities Officer organised the Einstein group of

dyslexic students to assist. Staff and students were very pleased to be involved. Their help made selection very straightforward.

The four visits were organised in the same way. The first hour was spent with customers trying out the systems, a surprise to some demonstrators who were not used to assessment by end users. The second hour was spent with assistants looking at the circulation system. The remaining time was given over to the librarians and systems staff to go into more detail on the other modules. Customers and library staff were given feedback forms, so impressions could be recorded and collated by myself for later reference.

The four systems short listed are shown below. The prices shown are as given to use in the spring of 1998. They are included to show the range of prices we were offered for a system with ten concurrent users covering cataloguing, circulation, acquisitions, OPAC, web OPAC and serials. The system price is for software only and excludes hardware, conversion, installation and training costs.

The comments are as Central staff and students saw the systems in February 1998. Clearly developments will have changed the systems since then. However, I hope they give a useful flavour of the sorts of issues we had to consider.

CAIRS

System price £16,515 (Discounted price for an existing user). Annual maintenance £4,954 (£3618 on existing software).

This was the up grade of our existing system. It became very clear that the software on offer was, at the time, still hugely under developed. For example, there was no reservations option on the OPAC. The screen design was cluttered, which confused our dyslexic customers. Many features which appeared as buttons on the screen could not be shown, with many promises of development sometime soon (mischievously described as "vapourware" by our Computer Services Manager).

When asked if any existing CAIRS users had upgraded to the new system, the answer was no, so we were looking at an untried changeover. It is worth noting that the upgrade would have required the expense of conversion of the existing catalogue to a new format, so there were no savings by staying with the incumbent supplier.

We could not recommend purchasing a system that was so underdeveloped.

O

System price £27,400 Annual maintenance £5,650

This was on paper the system that was closest to our operational requirement, but at a price which we really could not afford.

The major failure of the system was the catalogue interface. If you miss-spelt a word O responded with "Word not recognised, please try again". This was a major barrier for the dyslexic students. For example, if you misspell British as bitsh, a dyslexic student may not know how to correct spelling. The only option with O is for the student to ask staff for help. This is potentially very embarrassing if the word is very simple, and the student may simply give up trying rather than lose face. (A and Heritage do not have this problem as we shall see.)

Other features also gave cause for concern. For example, the in-library Windows based search screen was radically different from the Internet interface, so customers really need to learn two systems. The Windows based screen used very small fonts, so it was hard to read and had a large number of obscure buttons.

On the operational side, the demonstrator was very keen not to show us the journals management software. I later discovered via my partner (who had O in her library) that this was because that module was, at that time, very poorly developed.

Our views were neatly summarised by one member of staff. Did we feel that paying double the cost of Heritage or CAIRS meant we got double the value for money? We did not feel O was worth the price premium.

A

System price £3,000 Annual maintenance £300

This was the cheapest system by far. However, our confidence in the supplier was not enhanced by their no show for the original demonstration which they had forgotten to put in their electronic diary!

Whilst we were confident that the library management side was reasonable, the customer interface gave cause for concern. Like O, A is based on a Windows style screen. A short way into the OPAC the user came to a screen where they are faced with myriad boxes and many buttons. We tried this with several students. At this particular point they all got stuck. If every student then came to ask for help, we would have been very busy at the desk and the system would have failed to deliver the customer independence we were seeking.

When customers wished to view their own borrowings they had to change into the circulation module and we were unable to get a clear answer as to how this might actually work on a day to day basis for a customer.

A is manufactured in Australia and used world wide mainly in school libraries. We gained the impression that the mass market approach meant tailoring the software to any special needs we might have was likely to be a low priority. (This had been a long standing problem with CAIRS, whose core market being special libraries, failed to develop their system to meet our needs, despite many requests and many promises to do so.)

So despite the price being the best we could get, the software left us wanting more.

Heritage

System price £11,350 Annual maintenance £1,362

At the time of purchase the following features stood out:

- OPAC

  Of all the systems, this was the easiest to use. The dyslexic students were very impressed with the way the system prompts by displaying the index, although their ideal would be a built in spell checker as in Microsoft Word. As a demonstration of the power of Heritage, a wildcard search was input for "*ing". The speed of retrieval actually made the IT Training Officer's jaw drop. Trials with a demonstration version of the system provided after the visit, showed that students were able to use the software with no help and were easily able to understand the information the system gives them. The interface is clear, with a well thought out layout and simple to understand Internet browser style buttons to click. Two terms use has shown this early promise to be fulfilled. Counter staff are asked about how to reserve items or how to find them on the shelves. Very rare indeed is the person who is unable to use the OPAC simply to search.

- Customer information

Access to a customer's own record is easy allowing you to see materials on loan, items previously borrowed and any outstanding fines. One special feature is the Areas of Interest menu. This allows customers to pick from the main subject areas on the catalogue to build up a profile of research interests. Once set up (and it can be amended at any time) as soon as an order for a new item is added to the system, they are notified. In practice this has been less successful, as CAIRS had no subject indexing, only keywords. As a result, the only terms which can be used for areas of interest are those which have been added over the last two terms. We need to do a lot more work on the catalogue before this feature will really work. However, students do appreciate being able to see the books they have on loan and reservations they have made.

- Links to images, the Internet and other electronic resources

  Heritage allows the storage of images, so for example an essential article or book chapter could (subject to copyright clearance) be held on the system for students to read, rather than relying on a printed copy kept behind the library counter. At the demonstration we were shown how a book record can be linked to a sample illustration to gain an instant feel for the quality of the contents, particularly useful for art and design material. Internet URLs can be catalogued and the web pages accessed from the catalogue terminal.

Two terms on and this feature is becoming increasingly useful. Resources directly accessed via Heritage include, for example, our three CD-ROM databases (British Education Index, Design and Applied Arts Index and International Index to Performing Arts), the Helix images collections and the Art Design Architecture and Media (ADAM) information gateway.

Installation

We bought the Heritage IV software in April 1998. Unfortunately, hardware installation (PCs linked by a Windows NT4 network), which we had perhaps naively thought would be the straight forward bit, was delayed. So the system was not networked until July 1998. Four staff had a day long training session at Inheritance Systems that month, and the summer vacation was spent trying to get to grips with circulation and cataloguing.

Data conversion was very easy indeed, so we had our own catalogue running on Heritage at the start of the summer vacation, which was an instant hit with customers. The main snag was that without live circulation, every single book showed as available! Fortunately, a quiet vacation minimised the number of confused customers.

Conversion of the paper circulation records was a long and tedious process, not helped by the illegibility of some of the records. At the time of writing we are doing a check on all books issued over last summer which are still issued. Many customers are convinced we issued them with books they had already returned at the end of the last academic year. However, few books have been found on the shelves.

The advantage of conversion over the summer was that we were in theory able to make a number of mistakes with the circulation set up and correct them before the mad rush which is the start of the autumn term. However, some errors only came to light with full term time operation. For example, our short loan period is 7 days. However, with Saturday and Sunday flagged as closed days, we needed to enter 5 days as the system loan period. (5 + 2 = 7 not 7 + 2 = 9) As 7 day loans were issued for the entire summer, we only discovered this when we began issuing short loans at the start of term. Fortunately that problem takes a few seconds to resolve.

On the down side, under pressure of heavy use at the start of term it became clear that Heritage IV was still very buggy. Overdues would not print, orders could be input but not processed and we had total failure which took two days to put right. Six months on and four upgrades later and things are much better.

Systems support

We have had several visitors to see Heritage IV in action. Visitors always ask about support. Inheritance log calls on the basis of seriousness of problem. If you have a mission critical problem, you get help quickly. Help with the finer points of reports get a lower priority, unless that too is urgent.

Particularly pleasing is that serious software problems get you put through to the software developer rather than the support team. The advantage for the library is that you get the expert to speak to. That expert is aware that software needs to be tested thoroughly before it goes out to avoid the calls straight to them from angry librarians. Very serious problems get you through to the managing director, David Salvesen, who is not afraid to get to grips with problems.

One clever support trick is that special reports or fixes of problems come by email as self-unzipping files which can be rapidly imported in to Heritage and used. This is usually far more efficient than trying to talk staff through procedures over the phone.

Features

Rather than list everything that Heritage can do, much of which is standard to many library systems, the following is a list of favourite things Heritage does which we find useful.

Navigation

Heritage lets you move around by clicking buttons or pull down menus or pressing function keys. (see Figure 1) This makes finding your way around very simple.

Cataloguing

Cataloguing is by form filling which is very straight forward. One clever feature is that zapping the item barcode (accession) number when in the standard number field makes Heritage find the catalogue record and display the ISBN. This is very useful if the book has no ISBN to search on, and you need to quickly find the record for a simple amendment.

The other useful feature is the easy addition of associate items, for example URLs. In enquiry these display with a clickable bar to take the user straight to the web page. (see Figure 2) Note the catalogue button allowing staff direct access to a catalogue record from the enquiry screen. (It is invisible to customers).

Circulation

A single button renews all items on loan to a borrower and the display shows the items new return date. (see Figure 3) Charges and fines Payments, waivers and charges can be added or deleted. A small notes field can be used to explain the reason for the charge or waiver. This screen also shows an example of a message that can be displayed on the readers main record. I should hastily point out that this abuse of my own record is purely for staff training purposes. (see Figure 4)

Customer loan periods

Many permutations of reader type and loan period can be set up. For example, we have been able to set up a special category of user to allow the dyslexic students a longer loan period followed by a grace period before an item is overdue. (see Figure 5) A standard full time undergraduate would have loan days set at 5 and days o/d set at 1.

Import

Import of reader records from our registry system is very easy. The Registry system is ol

generates very rudimentary reports. Heritage has a very flexible module which uses a wizard style approach to take you through the import process. (see Figure 6) As can be imagined, this has saved a huge amount of time spent inputting customer details.

Reports

The reports module includes a long menu of choices. (see Figure 7) A big time saver for us this year will be the ability to generate letters to all final year students reminding them to bring materials back and inserting a list of all items issued to each individual.

Pending a network link, we have used the reports module to generate stock lists for our St Pancras Way site, replacing the out of date card catalogue and a huge printout from CAIRS.

OPAC

This has proved to be as easy to use as the demonstration suggested. The design is similar to a web browser with big clear buttons and obvious choices. (see Figure 8)

The future

We have now been using Heritage for two terms. There still developments to come:

- Serials We have catalogued most of the serials, but now need to implement the management module to allow computer based checking in and chasing of missing issues.
- Internet OPAC Our web site should go live by the summer and with it Heritage. This will be a major help for distance learning students and staff working from home.
- Map This option allows you to display a map to point the customer to the correct shelf in the library. This will be worked on once the stock take and summer weeding is finished.
- Bookings module This is expected at Christmas 1999. We currently issue media equipment on Heritage but advance bookings are still on paper. This module should eliminate double bookings and will be used for PC bookings in the library.

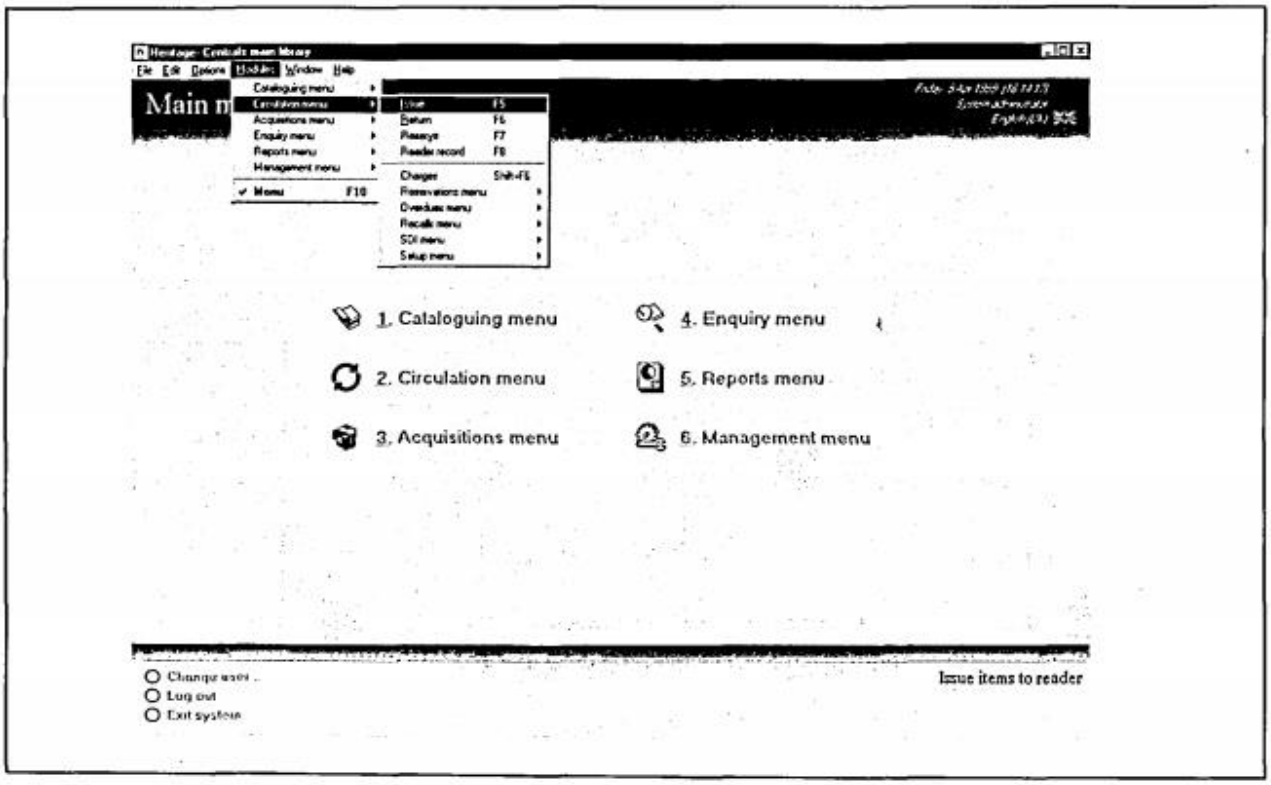

Figure 1 – Main menu page showing icon buttons, pull down menu and function key options

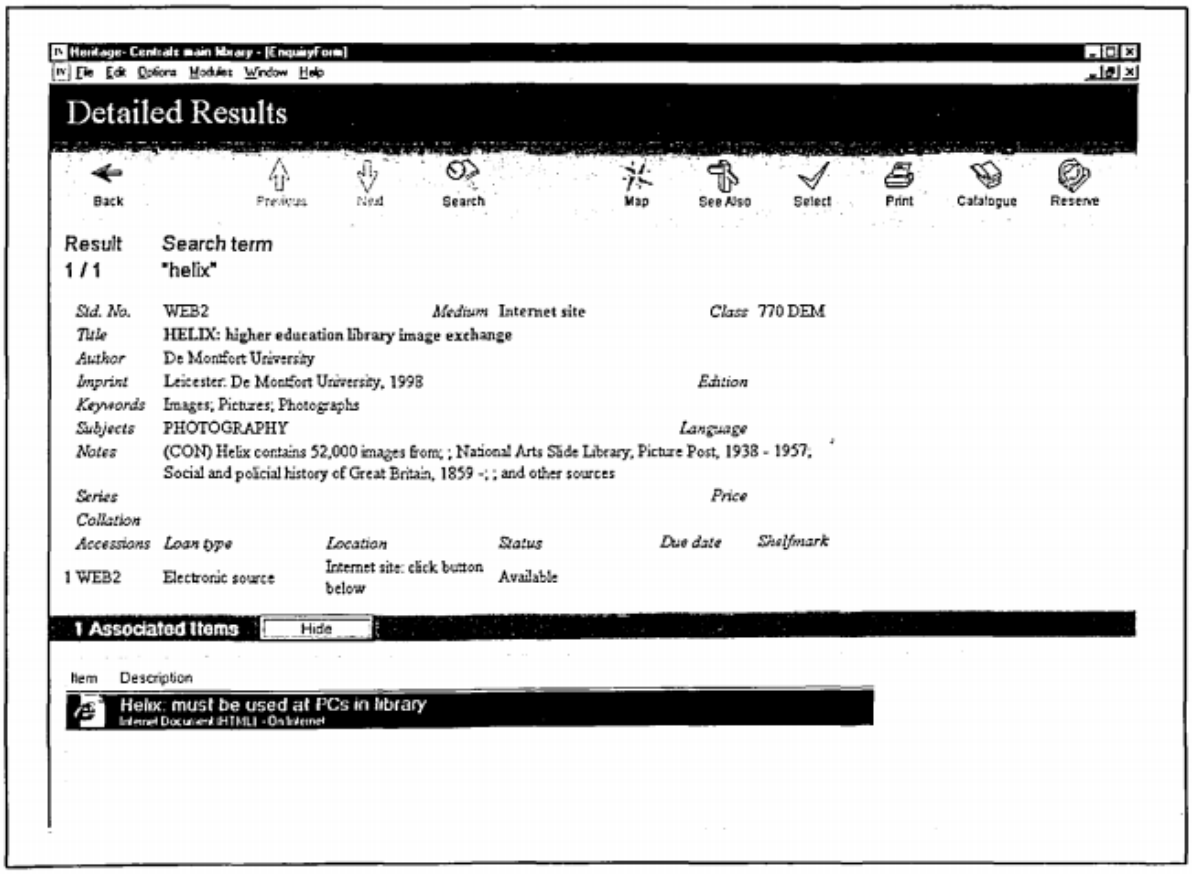

Figure 2 – Catalogue record screen showing associated item link to Internet site

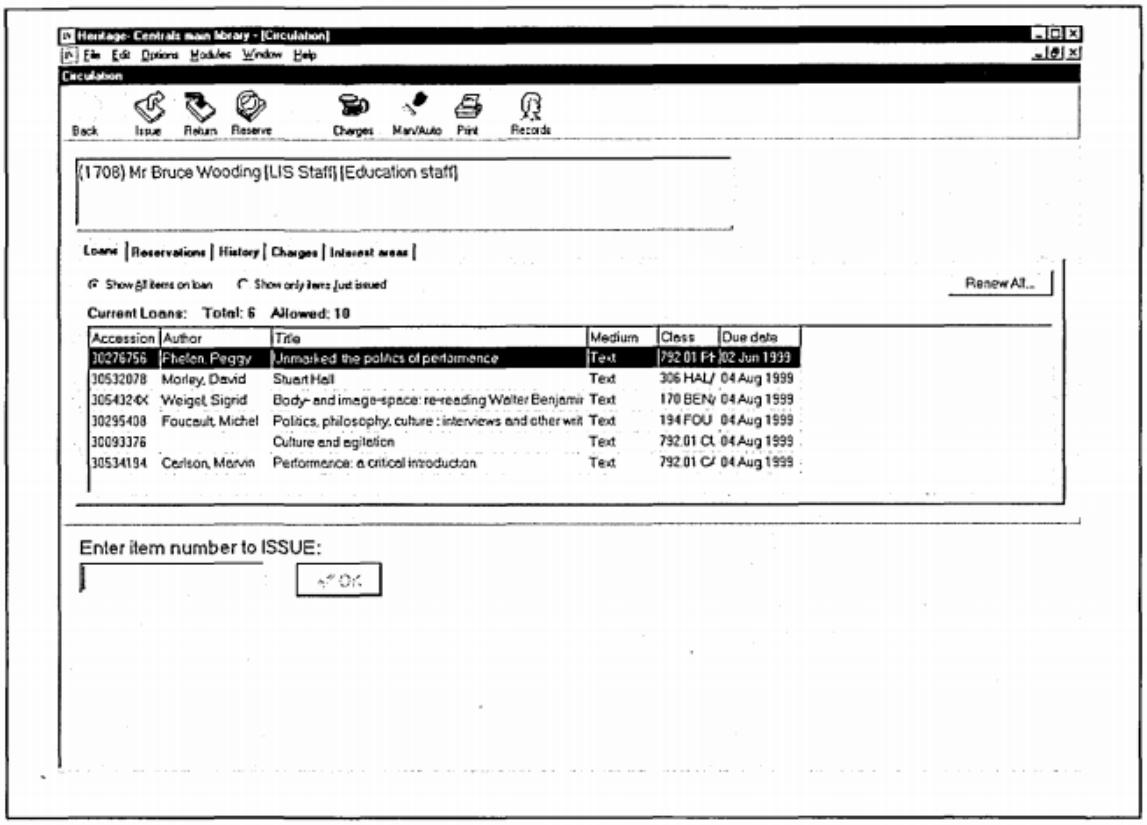

Figure 3 – Circulation issues screen showing renew all button

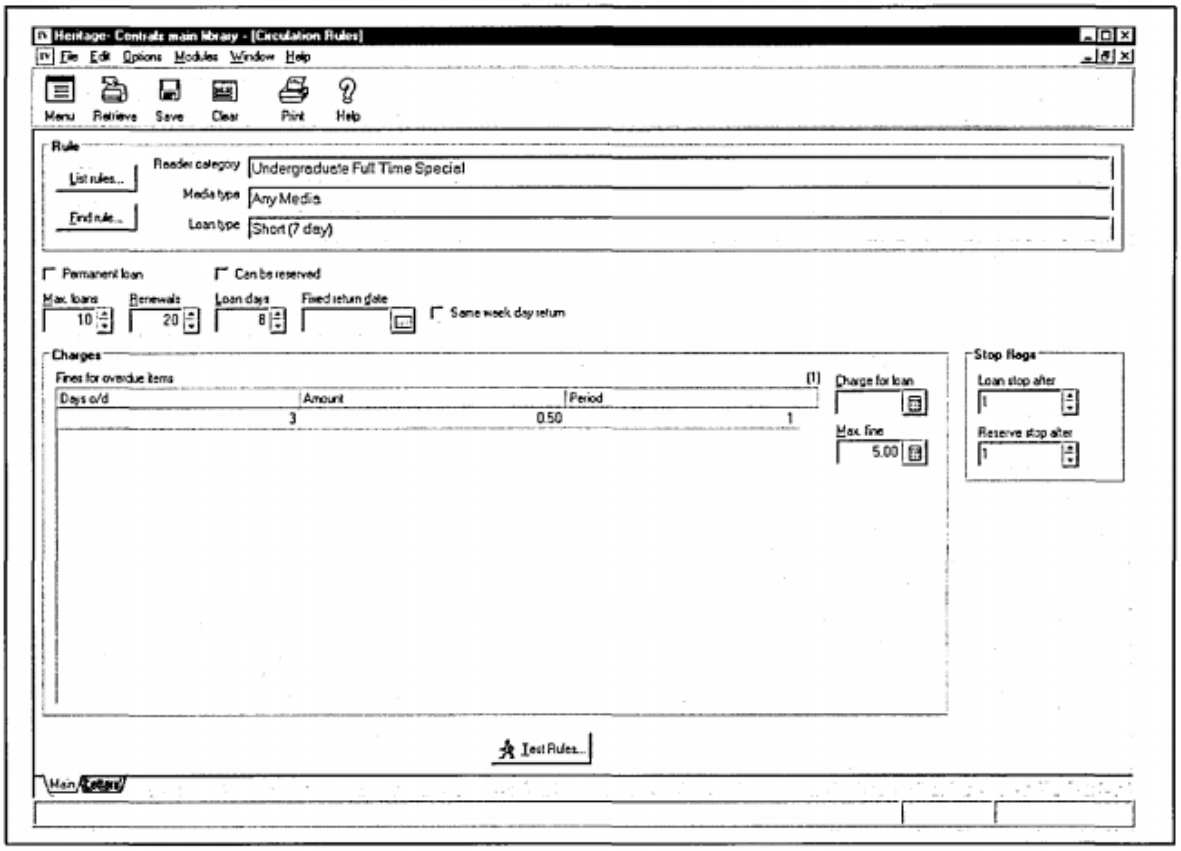

Figure 5 – Circulation management set up for dyslexic students with 3 day grace period for charges

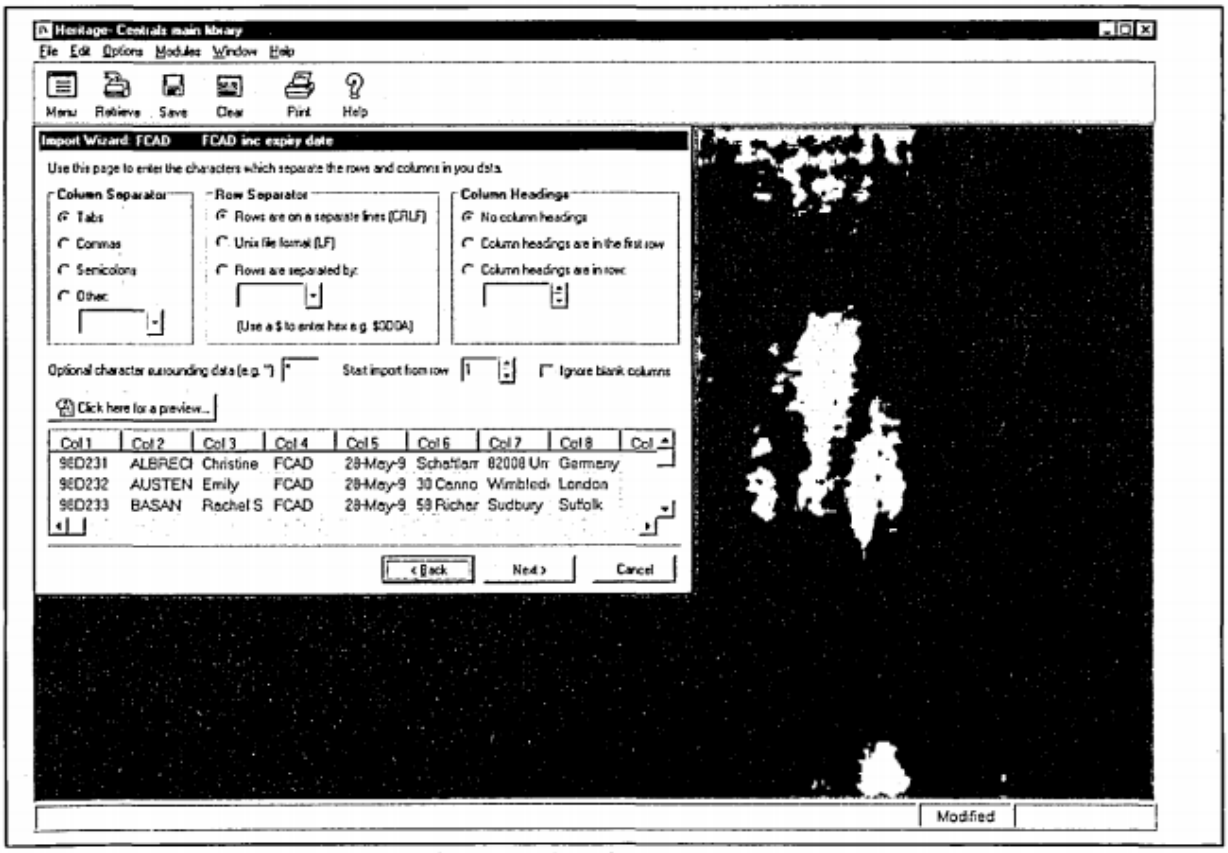

Figure 6 – Reader import wizard showing data editing in progress

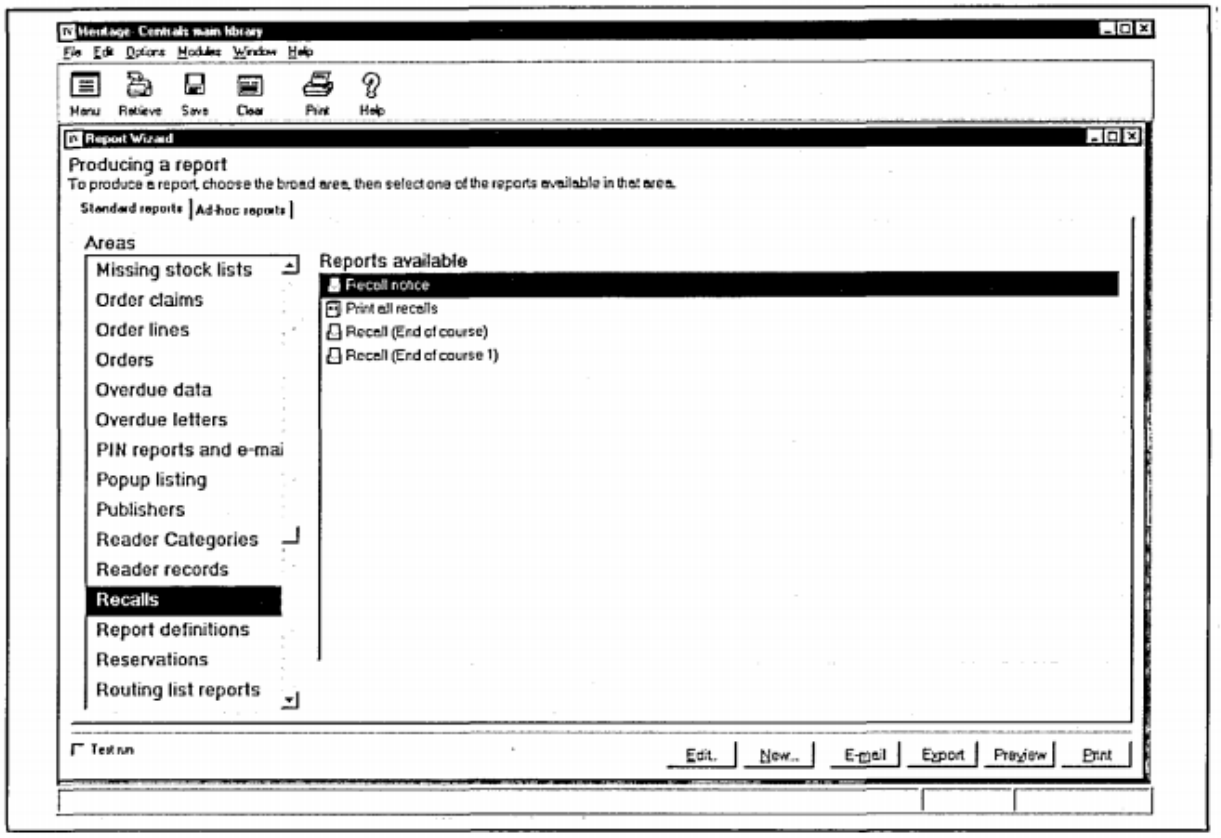

Figure 7 – Reports module showing recalls section of the reports menu

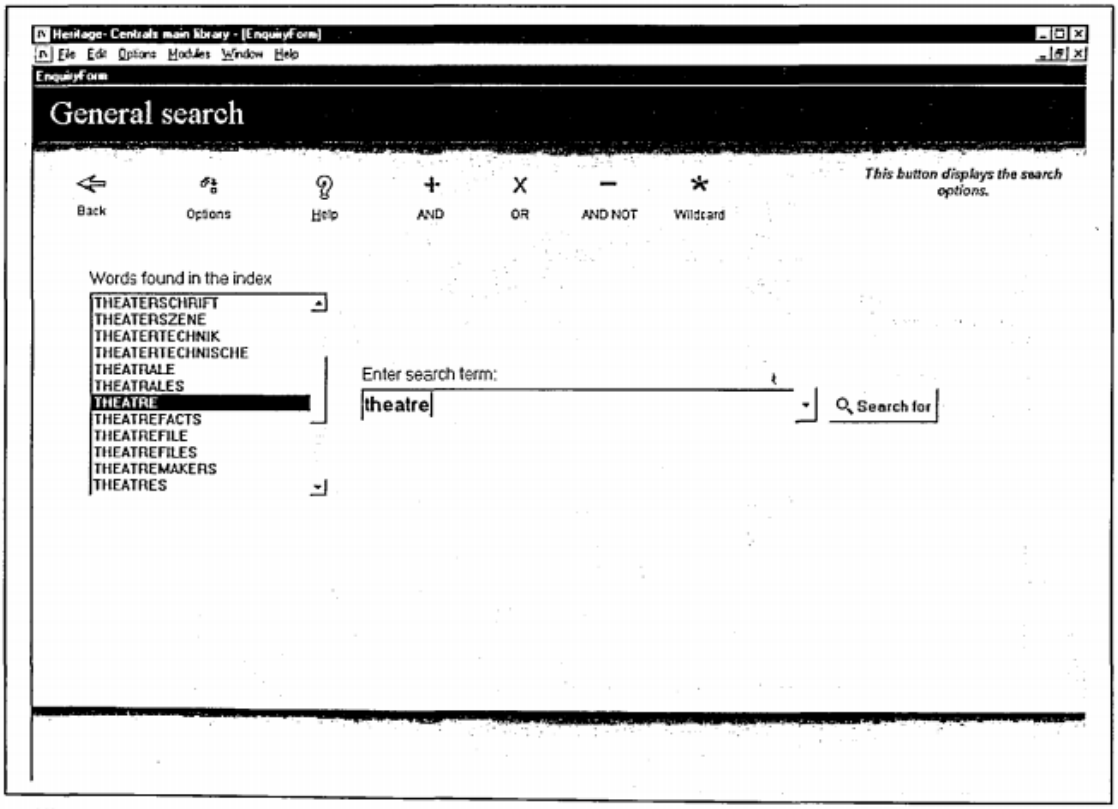

Figure 8 – Enquiry module showing general search screen, with Boolean search buttons and on screen browsable index